

Considerations for non-Fidelity custodian firms

- **Advent data feed** – Please confirm that the Advent data feed has been setup on all managed accounts in CIAP.
- **Online access** – Please link any new CIAP accounts to the single log-in ID for all Fidelity Charitable registered accounts at your firm.
- **Statements** – Please ensure that Fidelity Charitable is signed up for e-delivery of statements and confirmations.
- **Proxy voting** – Fidelity Charitable will vote all proxies. For additional information please refer to the Charitable Investment Advisor Program Investment Policies and Guidelines.
- **Money movement** – Please ensure that you have specified the appropriate point of contact for requests to raise cash for grants and fees.
- **Account opening – REMINDER:** Fidelity Charitable is the owner of the assets held within CIAP Accounts. Therefore, CIAP Accounts are registered under the Fidelity Charitable TIN.